My O_2 Business User guide

Contents

This is your guide to My O_2 Business. It's easy to use. Move your mouse over the page to get to the section you want. Contents and sections at the top right of the page all act as links. Even the web address at the bottom. Just click and go.

Important: Some functionality found within this user guide may not apply to your role.

Section 1
What is My O_2 Business?

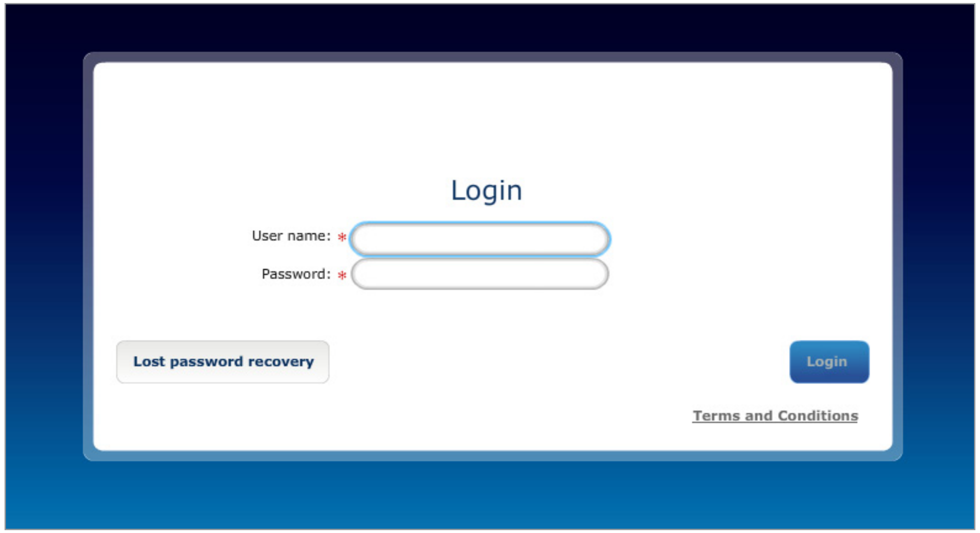
Gives you greater control over your O_2 Business Account than ever before. Makes it much easier to keep an eye on everything that's going on in your account. From basic details to how much you spend.

Section 2
Getting started

All you need to know to get up and running with My O_2 Business.

2.1 Logging in

Before signing into My O_2 Business for the first time, please check you've got our email with your username and password. Your username will be the email address you used to register with.



How to do it

1. Go to **www.businessonline.o2.co.uk**
2. Enter your username and password, click **Login**. The first time you login you'll need to change your password. Enter your existing password, then your new chosen password, click **Submit**.
3. When your password has been successfully updated, click **OK**.
4. As well as your password, you'll need to choose a security question in case you ever forget your password.
5. Click the drop-down menu to choose your question.
6. Enter your answer, click **Submit**.
7. Your secure login details have been updated so you can start using My O_2 Business, click **OK**.

Important: If you enter your password incorrectly three times, you will be locked out. Talk to an admin user in your organisation or O_2 customer care to reset your account.

Your new password should be a minimum of eight characters and include a mix of letters and numbers. Avoid using in order, eg 123 or ABC.

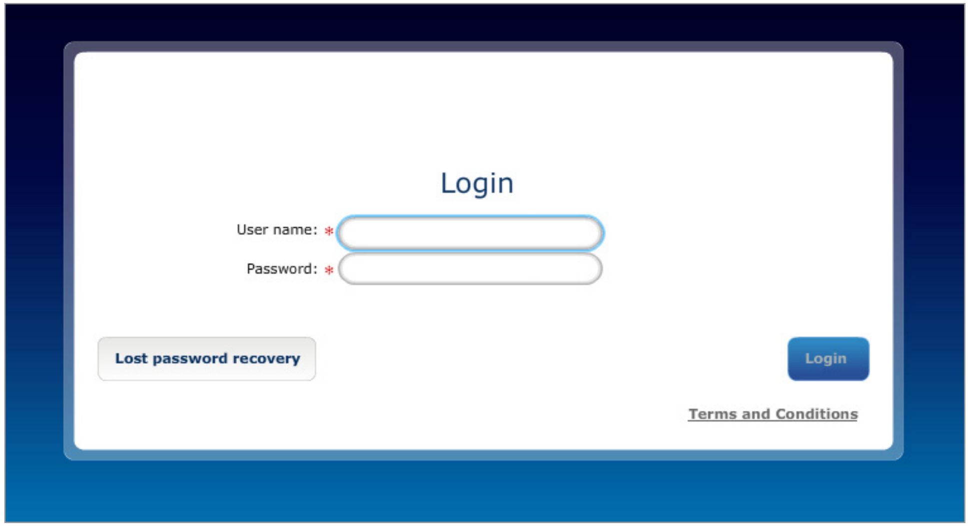
2.2 Forgotten password

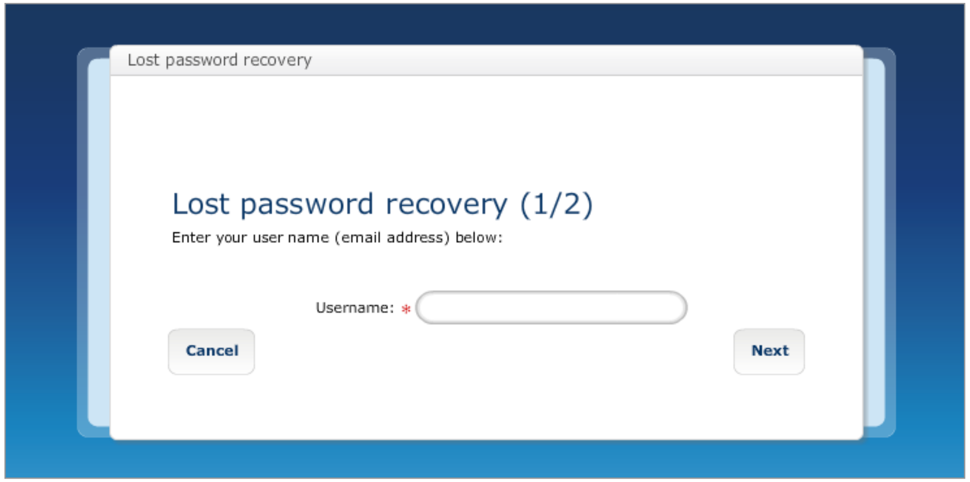
If you forget your password you'll need to reset it.

How to do it

1. Go to **https://businessonline.o2.co.uk**, click **Lost password recovery**.
2. Enter your username (this will be email address you used to register), click **Next**.
3. Enter the answer to your security question, click **Submit**.
4. We'll send you an email with your new password. Click **OK**.
5. Enter your username and the new password we sent you, click **Login**.
6. You'll need to change your password. Enter the password we sent you then your new chosen password, click **Submit**.
7. Your secure login details have been updated so you can start using My O_2 Business, click **OK**.

IMPORTANT : If you enter your password incorrectly three times, you will be locked out. Talk to an admin user in your organisation or O_2 customer care to reset your account.



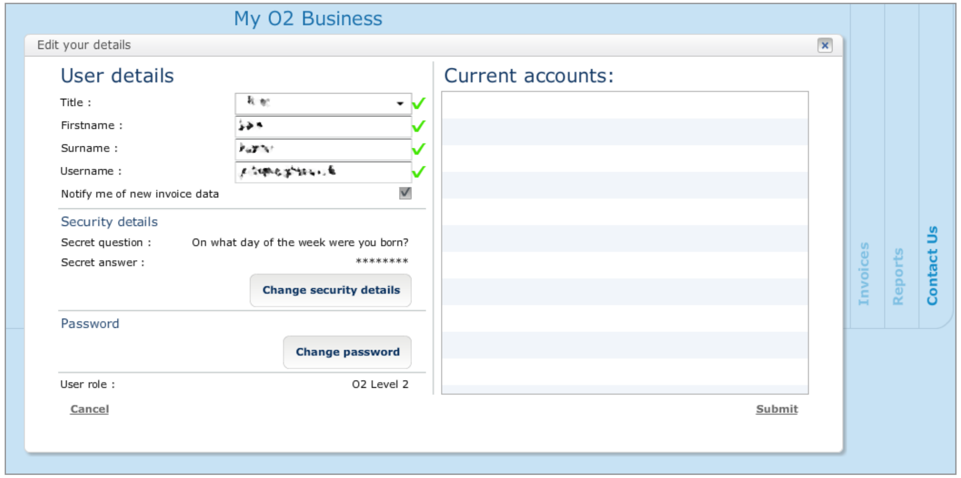


2.3 Editing your details

You can easily make changes to your personal information and security details.

How to do it

1. Log in.
2. Click **My details**, and make any changes.
3. If you want to change your security details, click **Change security details**, select a new security question, enter your answer, click **Submit.**
4. If you want to change your password, click **Change password** fill in the details and click **Submit**.
5. Click **OK** to update your details.

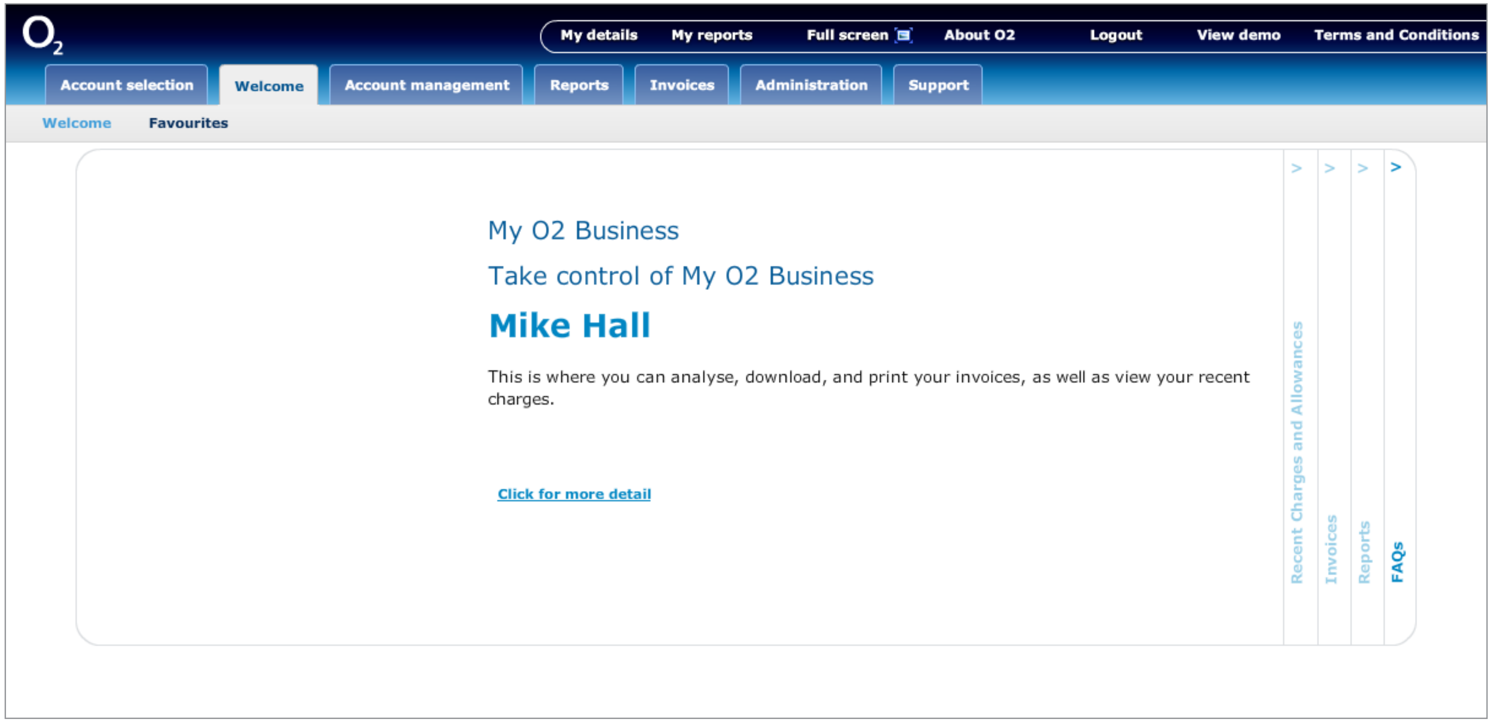


Section 3
Managing your users

How to view and manage your settings and users.

IMPORTANT: Depending upon your role, you may not have access to all the administration areas.

3.1 Welcome page



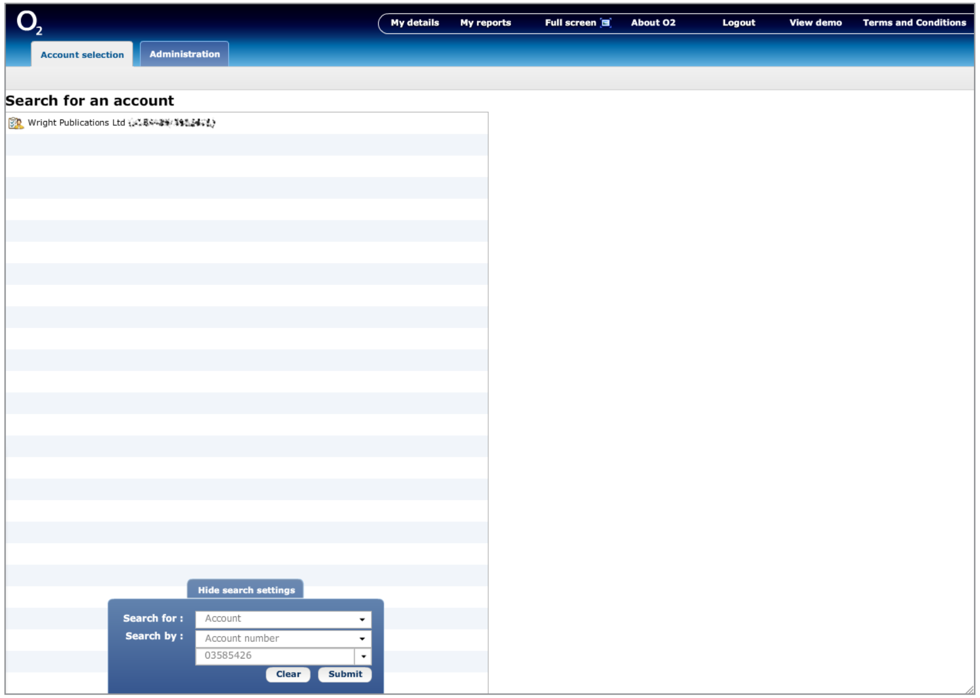
3.2 Searching for an account

If the account you need doesn't appear in the Account selection bar you will need to search for the account.

How to do it

1. Click the **Show search settings** tab at the bottom of the screen
2. Select an option from the **Search for** pull down menu
3. Select an option from the **Search by** pull down menu
4. Enter the number to search for and click **Submit**
5. Your account(s) should appear in the list above.

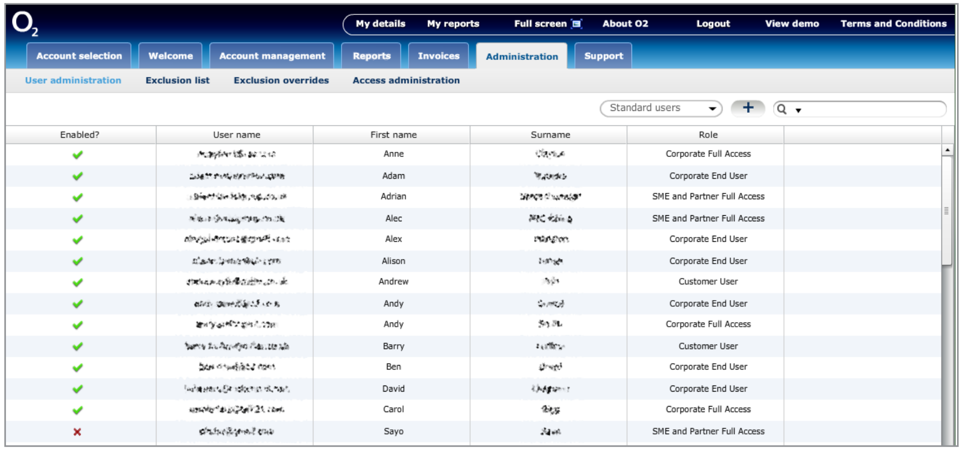
If you have access to more than one account or number, you will be given a list. Highlight the one you want and click **Select**.



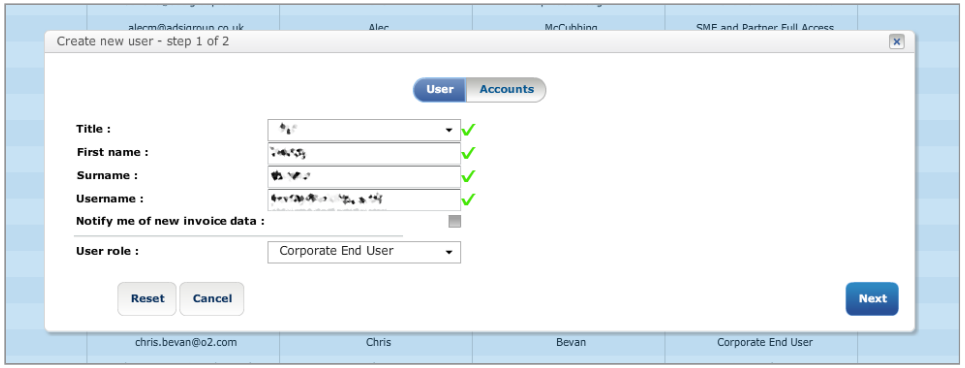
3.3 Users

Creating a new user

1. Log in and select the account you want to view, click **Select**.
2. Click the **Administration** tab.



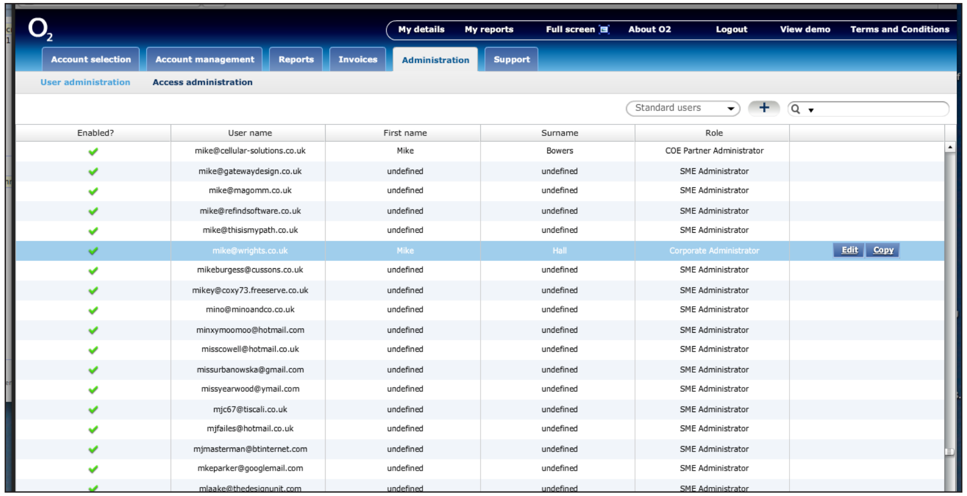
3. Click the **+** button.
4. Click the **Title** drop-down menu to select the new user's title. Then enter **First name**, **Surname** and **Username** in the correct fields. The username must be their email address.
5. Click the **User role** drop-down menu and choose a role, click **Next**.



6. Click the **Search for an account** drop-down menu.
7. Select the type of account you want for the new user.
8. Click the blank **Number** box and enter the new account number, or user mobile number, click **Submit.**
9. With the new number highlighted, click **Select**.
10. Click **Submit**.
11. Click **OK**.

Editing a user

1. Log in and select the account you want using the search options, click **Select**
2. Click the **Administration** tab
3. Select the user you want to edit
4. Click **Edit** and make any changes
5. Click **Yes** to confirm.



Stopping user access

You can't delete a user from My O_2 Business, but you can stop their access.

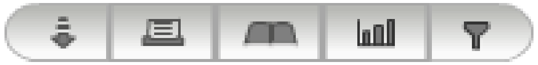
1. Log in and select the account you want using the search options, click **Select**
2. Click the **Administration** tab
3. Select the user whose access you want to stop
4. Click **Edit**
5. Untick the box next to **User enabled**
6. Click **Next** to confirm then **Submit**.

Section 4
Using My O_2 Business

Everything you need to know.

4.1 Functional Toolbar

Some features give you a Functional Toolbar to use eg viewing data in the invoice section. You can filter through the details, view information graphically, use your address book, print and download.



Save and download.

Print the report to file as you see it on screen.

The address book lets you add private and public addresses as well as importing and exporting lists.

View usage as a graph.

Click to open the **Filter & column visibility** view.

Adding names to the address book

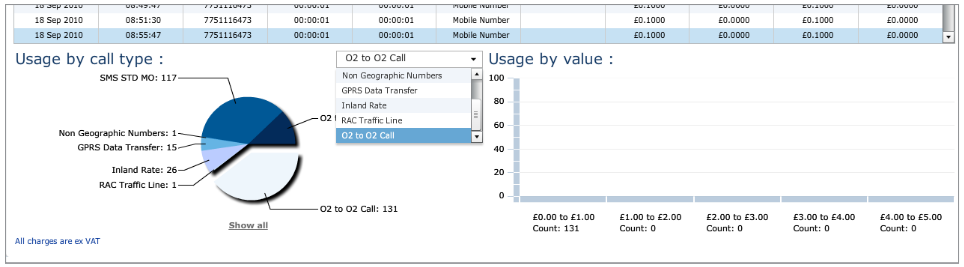
1. To add to your address book, click then click **Create**.
2. Enter the number in the **Number dialled** box.
3. Enter the description name in the **Description** box.
4. Repeat the process to add any more numbers to your address book, click **Save list**.

Importing names in to the address book

1. Create a csv file containing two columns with the headers **number** and **description**.
2. Click to access the address book.
3. Click **Import List**.
4. Select the list to import.

Viewing graphics

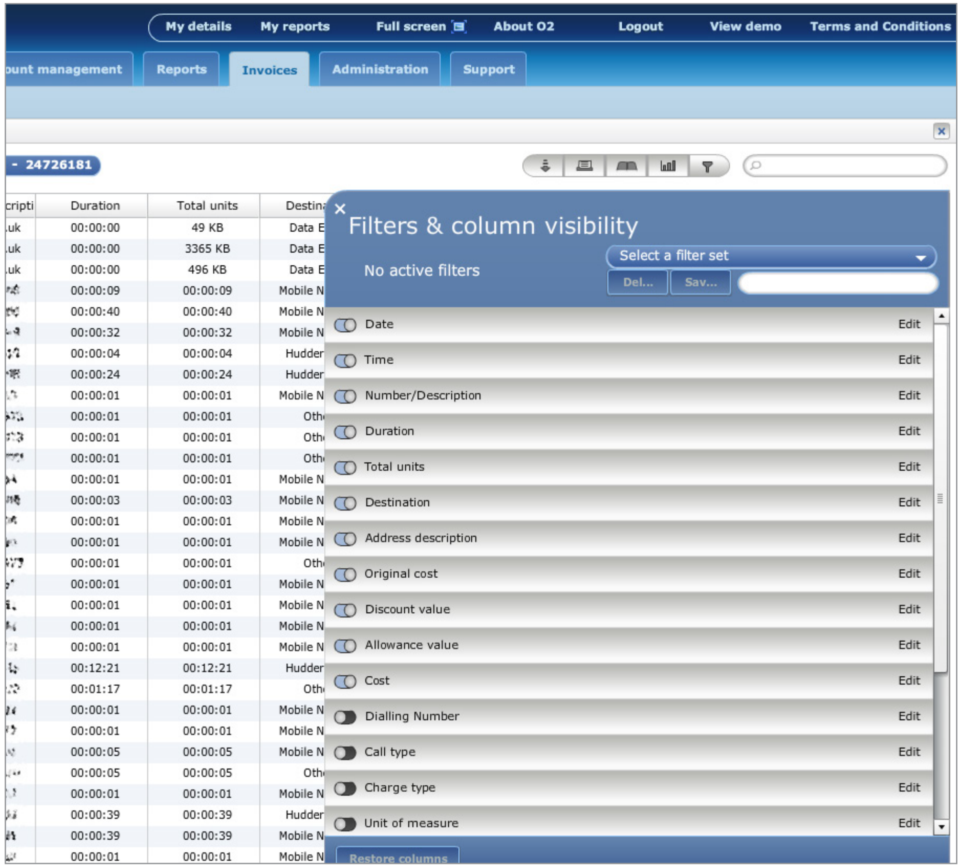
1. Click to view your information.
2. Your information will be shown as a graph and pie chart.
3. Click the drop-down menu to view specific information.
4. The charts will change automatically.



Filters and column visibility

These allow you to change the column headers you want to see. Or you can select a range for the data. For example you can view data for specific dates or times.

1. Click to open the filter box.
2. Clicking the button next to the description either displays or removes the column from view.
3. To return to the default view, click **Restore columns**.
4. To edit a filter, click **Edit** on the appropriate filter.
5. Enter the required information or click the available sub-options.
6. Select any additional information.
7. Click **Save**. The new filter will be activated.
8. To select a previously saved filter set, click **Select a filter set** drop-down menu and choose a saved filter.
9. To close a filter set, click the red **Close** button on any active filter set.
10. To close the **Filters & column visibility** options, click on **X**.



4.2 My Favourites

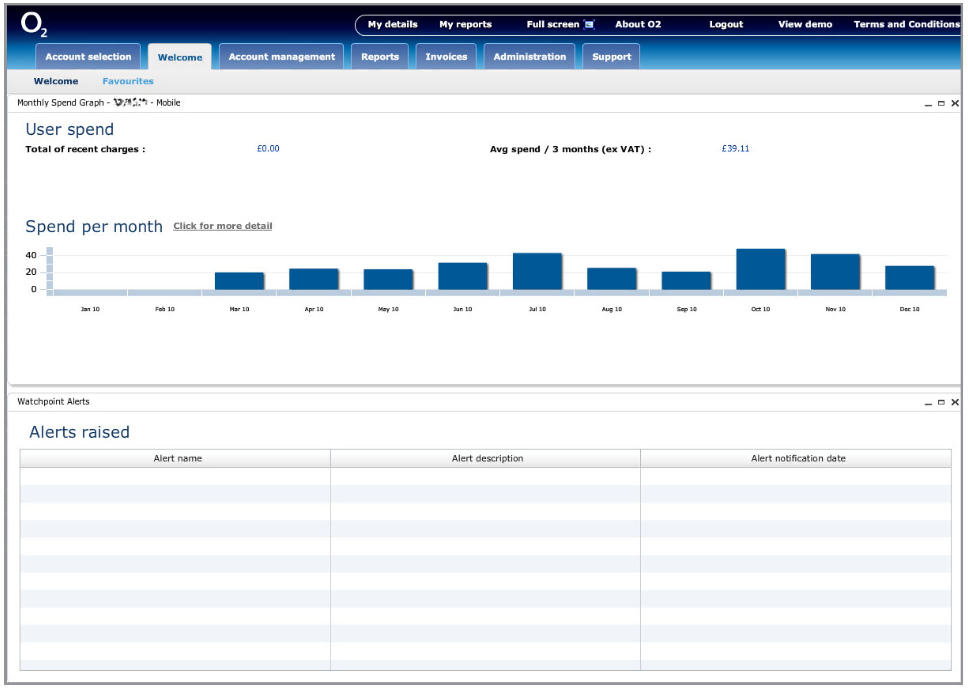
Favourites is used to display certain types of information quickly. You can have up to four Favourites saved at any one time.

Adding to Favourites

Simply click Add to favourites when it appears, and it will automatically appear in the **Favourites** page under the **Welcome** tab.

Removing Favourites

Go to the **Favourites** tab, and click the **+** icon in the top right-hand corner of the report you want to remove.

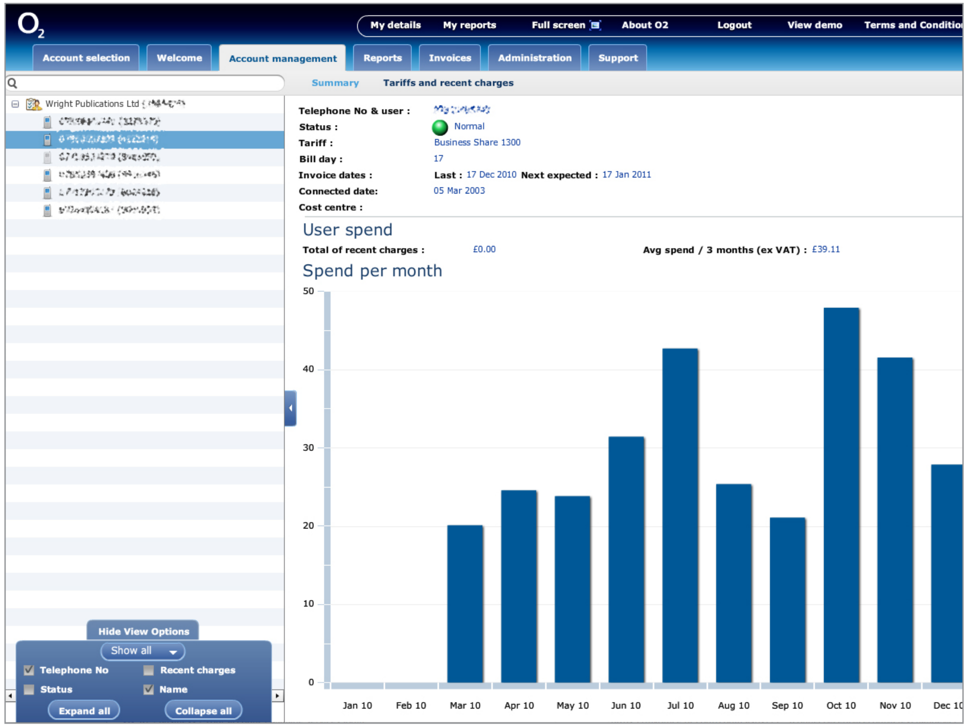


4.3 Managing accounts

The Account management menu lets you see a summary of your accounts since your last invoice. This lets you see how much you've spent, recent charges and tariff information not yet been invoiced. The account appears on the left of the screen and the summary information appears on the right.

Viewing an account - summary

1. Log in and select the account you want using the search options, click **Select**.
2. Click the **Account management** tab and click **Summary**.
3. Your **Group account** is at the top, click your **Group name** to view your group details. Click the **+** symbol to expand your Group account.
4. Click **+** to expand any of your main accounts (if applicable).
5. Click **+** again to expand your accounts (if applicable).
6. Clicking an individual mobile, broadband or landline number, shows its specific details.
7. Alternatively, instead of manually expanding through the account numbers, you can control what you see using the **Show View Options** tab.



If you have access to more than one account or number, you will be given a list. Highlight the one you want and click **Select**.

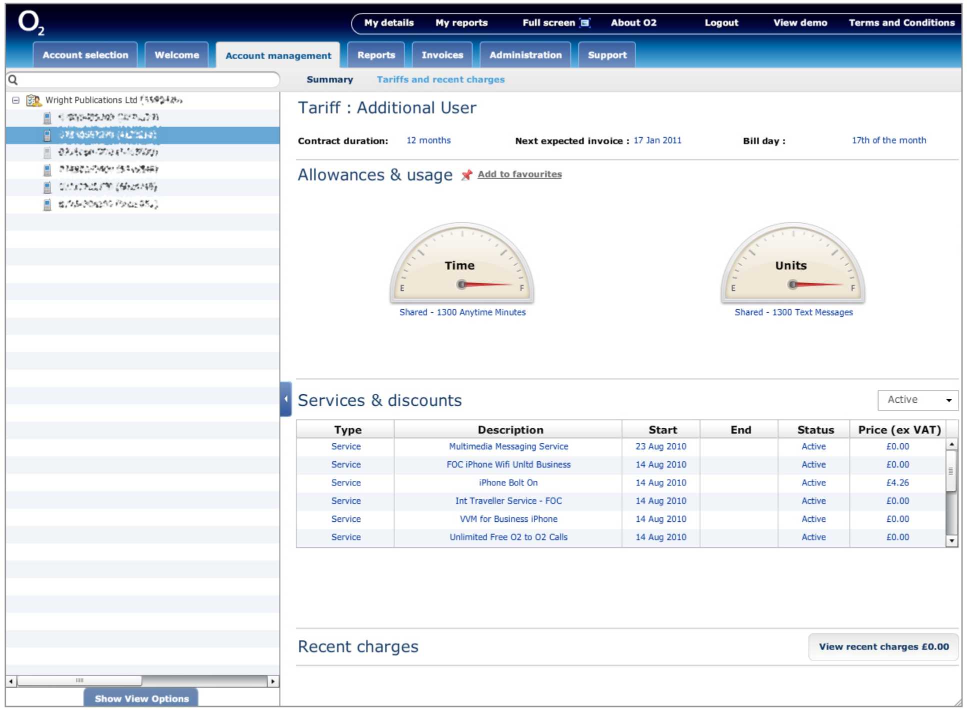
Use the **Show View Options** tab at the bottom of the screen if you want to expand your accounts automatically to find the information you're looking for. Or it can be used to change the information shown on the left screen.

Tariffs and recent charges

From this screen you can see:

- Your tariff details – displays your contract duration, billing date and next expected invoice.
- Allowances & usage – your minutes, messages and data allowances, individual or shared. Roll over the dials to see your used minutes and allowance.
- Services & discounts – allows you to view their status. Use the drop-down menu (Active) to view by type – active, pending or expired.
- Recent charges – click **View recent charges** to review in more detail (see page 18).

The recent charges shown will be those charges since the last invoice.

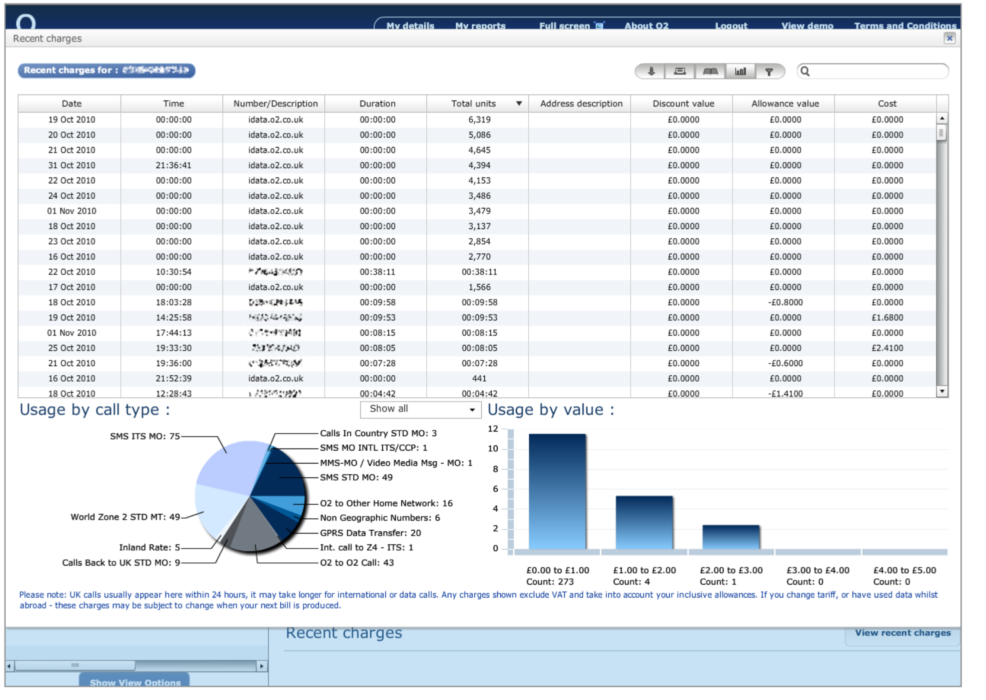


Recent charges

You can review recent charges for an individual number since your last invoice. Using the Functional Toolbar (see page 13) you can:

1. Create and save the report file you see on screen.
2. Print the report.
3. Open the address book.
4. See a graphical representation of data usage.
5. Apply filters to refine your data selection.

The screen shot opposite shows the recent charges for an individual number using the chart option from the Functional Toolbar.



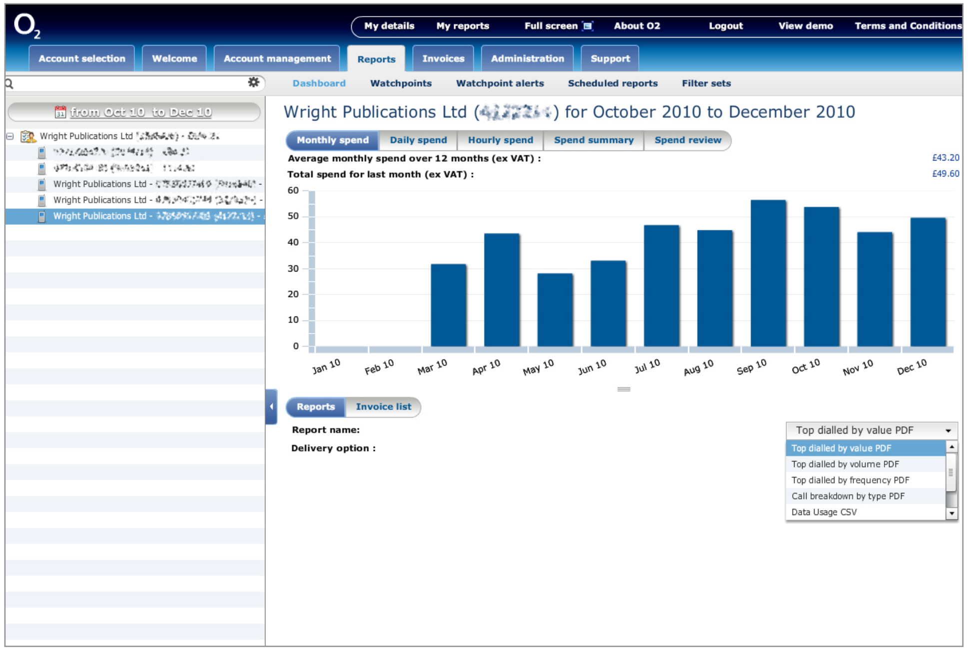
Clicking a column header allows you to sort the data in ascending or descending order and is shown with ▲ or ▼. You can also drag the columns to make them wider.

4.4 Reports

The Reports tab lets you review how much you spend across any level of your invoice data. It gives you easy and clear total, summary and trend information across your account as well as standard reports and any reports you have created yourself. You can print or download your data from the Reports feature at any time. Some reports will be in pdf or csv and some will be in both.

Other options available

- **Dashboard** - provides a summary of your spend, based on the level of the hierarchy chosen. There's a number of reports available – Monthly/Daily/Hourly spend, Spend summary and Spend review. You can also see reports such as Top dialled by value, high spenders and low spenders.
- **Custom Hierarchies** - allows you to create a new hierarchy structure to mirror your business. By creating a Custom Hierarchy you can run standard reports (i.e. those visible on the Dashboard screen) against this structure, rather than the structure that comes as standard from our billing system.
- **Watchpoints** - allows you to set some specific criteria to send an alert when the bill data loads. For example, fixed-line or mobile accounts, or numbers that have spent above a certain amount.
- **Watchpoint alerts** - once the Watchpoint has been set, for example any number spending more than £100, an alert will tell you who met or exceeded the limit.
- **Scheduled reports** - let you create a report to run on a specific date/time and automatically emailed if needed. Once you've created a scheduled report and you can run it immediately and download through My Reports.
- **Filter sets** - use to create your own reports to look at specific call types, dates, destinations, costs, numbers dialled and more. You can use the additional **Dialled numbers** or **Working hours** lists to include or exclude specific numbers or times for the report. For example, to see what calls are made out of office hours.



Viewing by date

You can search for information between two specified dates.

1. Log in and select the account you want to view, click **Select**.
2. Click the **Reports** tab.
3. Your Group account is at the top, click the **+** symbol to expand your Group account.
4. Click the **Calendar** icon under the search bar.

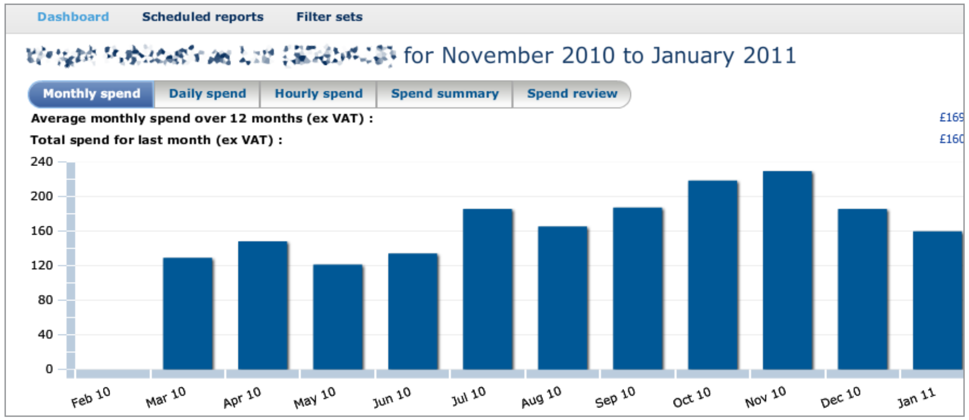
5. Click the **From** and/or **To** drop-down menus.
6. Select the required dates from the drop-down menus.
7. Click **Go**. Details between the selected dates will be displayed.

Viewing by spend

1. Log in and select the account you want to view, click **Select**.
2. Click the **Reports** tab.
3. Your Group account is at the top, click the **+** symbol to expand your Group account.
4. Click **Invoice list** under the chart.
5. Click **Usage** on the line of the invoice number you want to view.
6. You can refine your search using the Functional Toolbar (see page 13).

Viewing spending details

1. Log in and select the account you want to view, click **Select**.
2. Click the **Reports** tab.
3. Find the details of the account you need.
4. By default, the monthly spending details will be displayed.
    1. Click **Daily spend** to show your daily spending details.
    2. Click **Hourly spend** to show your hourly spending details.
    3. Click **Spend summary** to show your spending summary details.
    4. Click **Spend review** to review your spending.



Viewing usage

1. Log in and select the account you want, click **Select**.
2. Click the **Reports** tab.
3. Find the details of the account on the left-hand side of the screen.
4. Click **Invoice List**, then click **Usage**.
5. Details of your account usage will be displayed. To view more or less information click the **Filters & column visibility** button in the Functional Toolbar.
6. Choose the information you want by sliding the radio buttons.
7. If you want to return to the default view of your usage, click **Restore columns**, otherwise click the **Close** button on the **Filters & column visibility** tab.
8. Your chosen usage details will be displayed. To see a visual representation of your usage, click the **Graphs** button in the Functional Toolbar.
9. Your chosen usage details will be displayed both as a pie chart and a graph.

If you have access to more than one account or number, you will be presented with a list, highlight the one you wish to view and click Select.

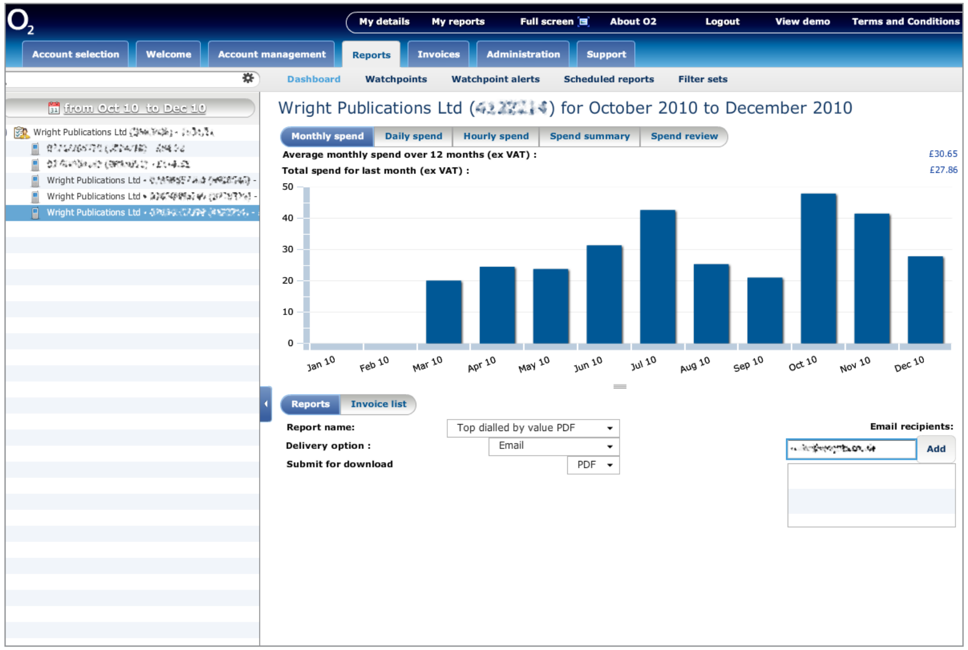
4.5 Working with reports

You can create a report and then view it online, download it or have it sent to you as an attachment.

Creating a report

1. Log in and select the account you want to view, click **Select**.
2. Click the **Reports** tab.
3. Click the **Report name** drop-down menu and select the type of report you want.
4. Click the **Delivery option** drop-down menu.
5. To view the report straightaway, click **Immediate** and click **Submit**.
6. The report will be displayed.
7. To select a different delivery option, click **Dashboard**.
8. Click the **Delivery option** drop-down menu.

- To have the report sent to you by email, click **Email**. Enter your email address and click **Add**. Repeat to add any others you want the report sent to, click **Submit**. Your report will be emailed to you.
- To submit your report for download, click the **Delivery option** drop-down menu. Click **Submit for download**, click **Submit**. Your report will be added to your download queue. Click **OK**. To access the report click the **My reports** tab.



Viewing reports

1. Log in and select the account you want to view, click **Select**.
2. Click **My reports** at the top of the screen.
3. A list of your reports will pop up. To cancel or delete a report, click the **Dispatched** check box on the report you want to remove.
4. Click **Delete/Cancel**.
5. The chosen report will be deleted. Click the **Close** button to close the **My reports** window.

Scheduling a report

1. Log in and choose the account you want to view, click **Select**.
2. Click the **Reports** tab, click **Scheduled reports.**
3. Click the **+** button and enter a name for the new report.
4. Click the **Report scheduled** check box.
5. Click the **Frequency** drop-down menu.
6. Decide how often you want the new report to run.
7. Either use the arrow buttons or enter the **Trigger** day or date you want the report to be scheduled.
8. Either use the arrow buttons or enter the number of days you want the report to run.
9. Click the **Scheduled report type** you want.
10. Click the **Report name** drop-down menu.
11. Choose the report name you're looking for.
12. Enter your email address and click **Add**. Repeat to add any others you want the report sent to.
13. Click the **+** button to expand your Group hierarchy and select the account for which you want a report, click **Save**.

Creating a new filter set

1. After you've logged in (see page 4) choose the account you want and click **Select**.
2. Click the **Reports** tab, click **Filter sets**.
3. Click the **+** button and enter a name for the new filter set.
4. Scroll to the filter you want to activate and click **Edit**.
5. Enter the details, click **Save**.
6. To add a working hours list (see page 26), click the **Working Hours Lists** drop-down menu.
7. Select the list you want to use.
8. Choose whether you want the filter to be active inside or outside of the working hours list.
9. Click the **+** button.
10. Your working hours list will be added to your filter set. To add a dialled number list (see page 25), click the **Dialled numbers** drop-down menu.
11. Select the **Dialled numbers** list you want to use
12. Choose whether you want the filter to include or exclude the dialled numbers list.
13. Click the **+** button, your dialled numbers list will be added to your filter set, click **Save**.

Deleting a filter set

1. Click on **Filter sets.**
2. Highlight the row that contains the one you wish to delete.
3. Click **Delete**.

Creating a dialled numbers list

1. After you've logged in (see page 4) choose the account you want and click **Select**.
2. Click the **Reports** tab.
3. Click **Filter sets**.
4. Click **Dialled numbers**.
5. Click the **+** button.
6. Enter a name for the new destination list.
7. Click the **+** button.
8. Click the **Destination** box and enter the number you want to add to your list.
9. Click the **Name** box and enter a name for your destination list.
10. With the new destination selected, click **Save**.
11. Click **Save**.

Deleting a dialled numbers list

1. Click on **Dialled numbers**.
2. Highlight the row that contains the one you wish to delete.
3. Click **Delete**.

Creating a new working hours list

1. After you've logged in (see page 4) choose the account you want and click **Select**.
2. Click the **Reports** tab.
3. Click **Filter sets**.
4. Click **Working hours lists**.
5. Click the **+** button.
6. Enter a name for the new working hours list.
7. Either use the arrow buttons or enter the number of hours you want your working hours list to run.
8. Click and drag the **Drag Me** block to where you want on the timeline.
9. To extend or shorten the working hours block, click **Edit**.
10. Change the new times as you want them, click **Save**.
11. The working hours block will resize accordingly. To delete the working hours block, select the block to be removed and click **Delete** from the menu bar at the bottom.
12. As an alternative to dragging and dropping the working hours blocks, click the **Day** drop-down menu.
13. Select the day for which you want a working hours list.
14. Change the working hours time as you want it, click **Add**.
15. The working hours block will be added to the timeline. Repeat to add working hour blocks to other days
16. With all hours and days added, click **Save**.

Deleting a new working hours list

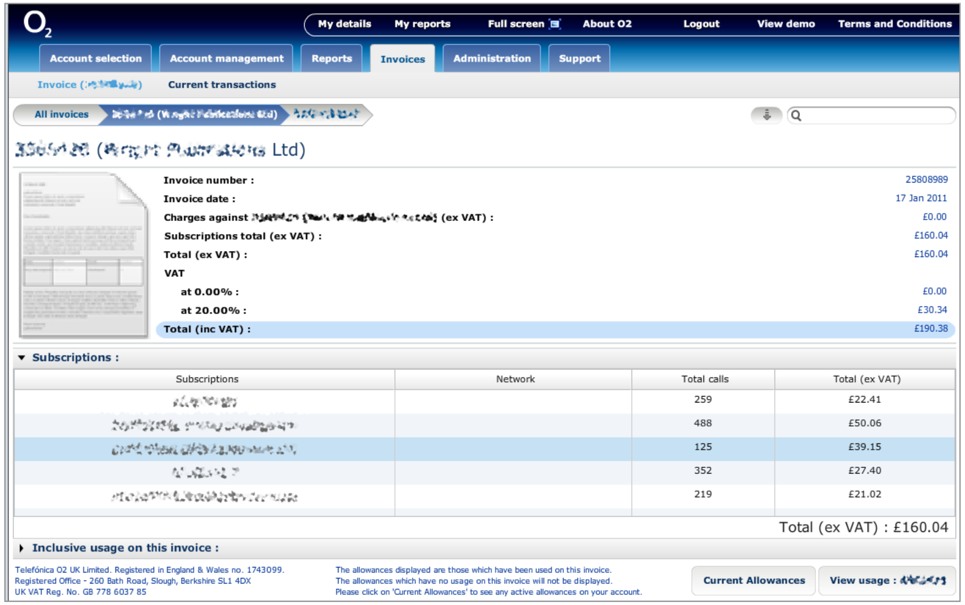
1. Click on **Working hours lists**.
2. Highlight the row that contains the one you wish to delete.
3. Click **Delete**.

4.6 Invoices

With My O_2 Business you can review all your invoices and all your current transactions. You can look at a complete account or an individual user. And using the powerful filters, you can also analyse usage over a period of time, by call type, call duration and date.

View an invoice by number

1. Login and select the main account you want to view, click **Select.** If you are already logged in, click **Reports** and select your main account.
2. Click the **Invoices** tab, then click **All invoices**.
3. Click the invoice number to see an overview of the main invoice. Clicking ▶ next to **Subscriptions** lists all the numbers on the invoice. Clicking ▶ next to **Inclusive usage on this invoice** lists your tariff details.
4. Under **Subscriptions**, click the number of the user you want to see.
5. Click a call type under **Calls** to see more details, or click ▶ next to **Charges against** to see further information on line rental and other services you may have.
6. You can then use the Functional Toolbar (see page 13) to analyse the call data further.



View an invoice by usage

1. Under **Usage** click the Usage for the invoice you want to see. If you have more than 5000 call records you will see a message: **The number of billed calls has exceeded the threshold**.
2. Click **OK**.
3. You'll then need to use the **Filters & column visibility** panel to refine your search.

For more information on the Filter & column visibility see page 14.

Section 5
Help

All the help you need.

5.1 Support

Accessing My O_2 Business FAQs

1. After you've logged in (see page 4) click the **Support** tab.
2. Click the **+** button to expand the general FAQs.
3. Click an FAQ to view it.
4. Click the **Next** and/or **Previous** buttons to scroll through.
5. To find a specific FAQ, click the **Search** box.
6. When you enter a keyword, only FAQs featuring that word will appear.